

## **Instructions and Guidelines for the Shareholder Portal**

The Shareholder Portal can be accessed at <https://ir-pan-info.infosys.com/>. Some of the important information about this portal and its related features are given below.

### **1. What is the usage of this Portal?**

**Answer:** This Portal is aimed for submission of tax forms, tax documents and tax declarations applicable in relation to Tax Deduction at Source (TDS) / Withholding of Taxes (WHT) on payment of dividend to Resident and Non-residentshareholders.

### **2. Who can use this Portal?**

**Answer:** Any shareholder of Infosys Limited as on the record date for payment of dividend can register and login to this portal

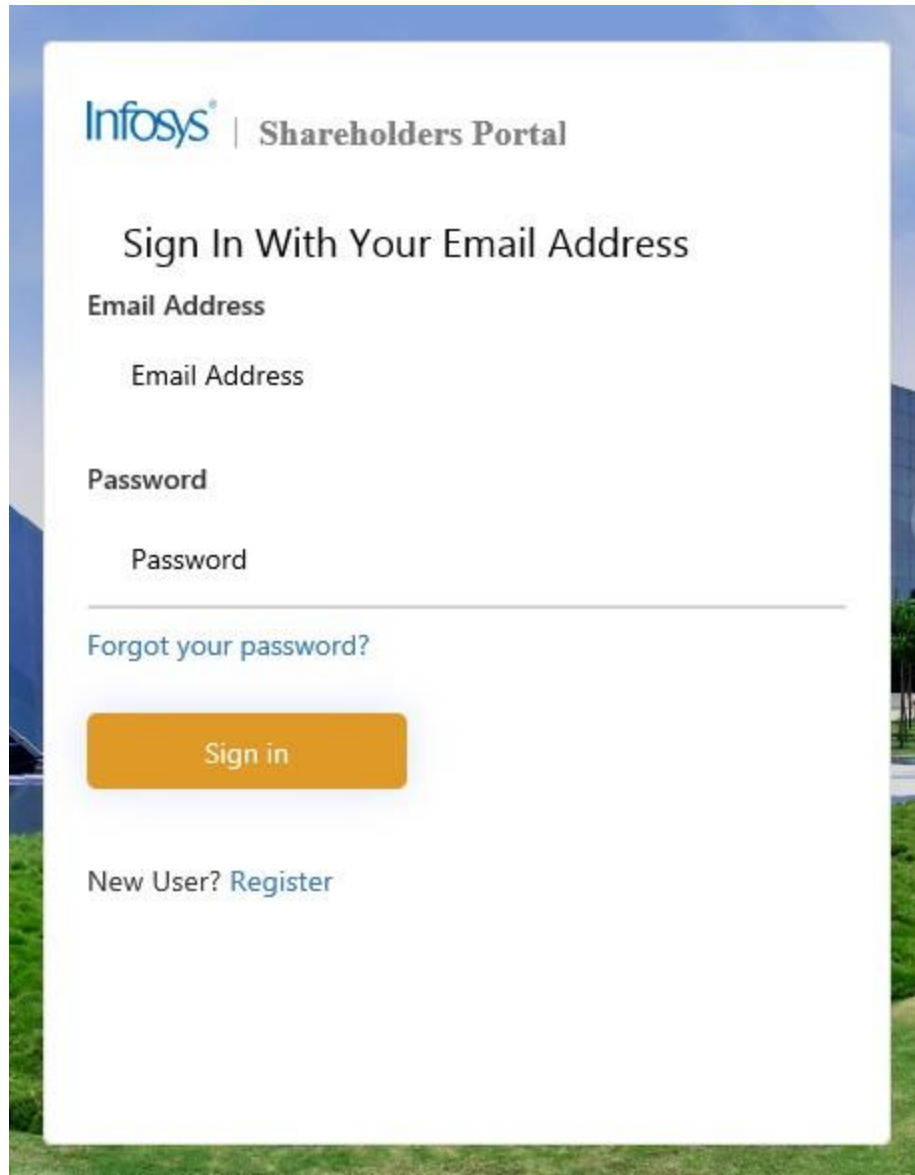
### **3. Where can the portal be accessed?**

**Answer:** Portal can be accessed by clicking into the below hyperlink

<https://ir-pan-info.infosys.com/>

#### 4. How to register or login in Portal?

**Answer:** The login page will open as shown in the below image:



First time user has to first register into the portal.

For registering, click on **"Register"**

## Sign In With Your Email Address

Email Address

Password

[Forgot your password?](#)

[Sign in](#)

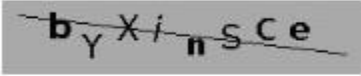
New User? [Register](#)

After clicking on “Register”, a new window will open for registration. For making registration, please enter - Permanent Account number (PAN) and DP ID & Client/Folio ID.

# Register

PAN

DP ID & Client/Folio ID ⓘ



Enter Captcha

**VERIFY**

**Members with NSDL account:** 8-character DP ID followed by 8-digit client ID. (For example, if your DP ID is IN300\*\*\* and Client ID is 12\*\*\*\*\*, then IN300\*\*\*12\*\*\*\*\*)

**Members with CDSL account:** 16-digit Beneficiary ID. (For example, if your Beneficiary ID is 12\*\*\*\*\* then 12\*\*\*\*\*)

**Members with Physical folio:** ITL + Folio Number registered with the company. (For example, if your folio number is 0\*\*\*\*\*, then ITL0\*\*\*\*\*)

Dear Shareholder, In case of shareholder having multiple Folio No/DPID & Client, then any Folio No/DPID & Client can be used to create the login credentials. Any Folio No/DPID & Client and Permanent Account Number (PAN) can be used for registration at this portal. The Tax forms or various documents submitted at the portal would be considered for all other Folio No/DPID & Client which has same Permanent Account Number (PAN) registered as per the information available with the depositories (NSDL/CDSL) or by the Registrar and Share Transfer Agent (KFin Technologies Private Limited).

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**Notes:**

- a) PAN is Permanent Account Number allotted by the Income Tax Department.
- b) Kindly note of the below while filling “**DP ID & Client/Folio ID**” at the time of registration.
  - (i) Shares held in Physical mode - Folio No. (Eg: ITL000000)
  - (ii) Shares held in Dematerialized Mode
    - NSDL - 8-digit DP ID and 8-digit client ID (Eg: IN3000001000000)
    - CDSL - 16-digit Beneficiary ID (Eg: 1200000000002000)

Once, “PAN” and “DP ID & Client/Folio ID” are filled, enter the **Captcha** as shown therein and then click on “**VERIFY**”

# Register

PAN

~~LJ s Ap P 5 8~~

DP ID & Client/Folio ID ⓘ

LJs|ApP58

VERIFY

**Members with NSDL account:** 8-character DP ID followed by 8-digit client ID. (For example, if your DP ID is IN300\*\*\* and Client ID is 12\*\*\*\*\*, then IN300\*\*\*12\*\*\*\*\*)

**Members with CSDL account:** 16-digit Beneficiary ID. (For example, if your Beneficiary ID is 12\*\*\*\*\* , then 12\*\*\*\*\*)

**Members with Physical folio:** ITL + Folio Number registered with the company. (For example, if your folio number is 0\*\*\*\*\*, then ITL0\*\*\*\*\*)

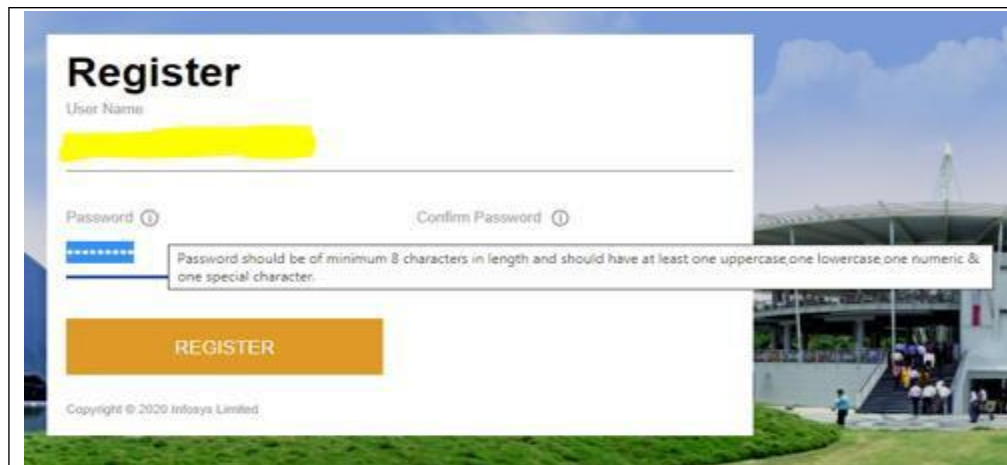
Dear Shareholder, In case of shareholder having multiple Folio No/DPID & Client, then any Folio No/DPID & Client can be used to create the login credentials. Any Folio No/DPID & Client and Permanent Account Number (PAN) can be used for registration at this portal. The Tax forms or various documents submitted at the portal would be considered for all other Folio No/DPID & Client which has same Permanent Account Number (PAN) registered as per the information available with the depositories (NSDL/CDSL) or by the Registrar and Share Transfer Agent (KFin Technologies Private Limited).

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After clicking onto “VERIFY”, Shareholder shall enter “User Name” and password.

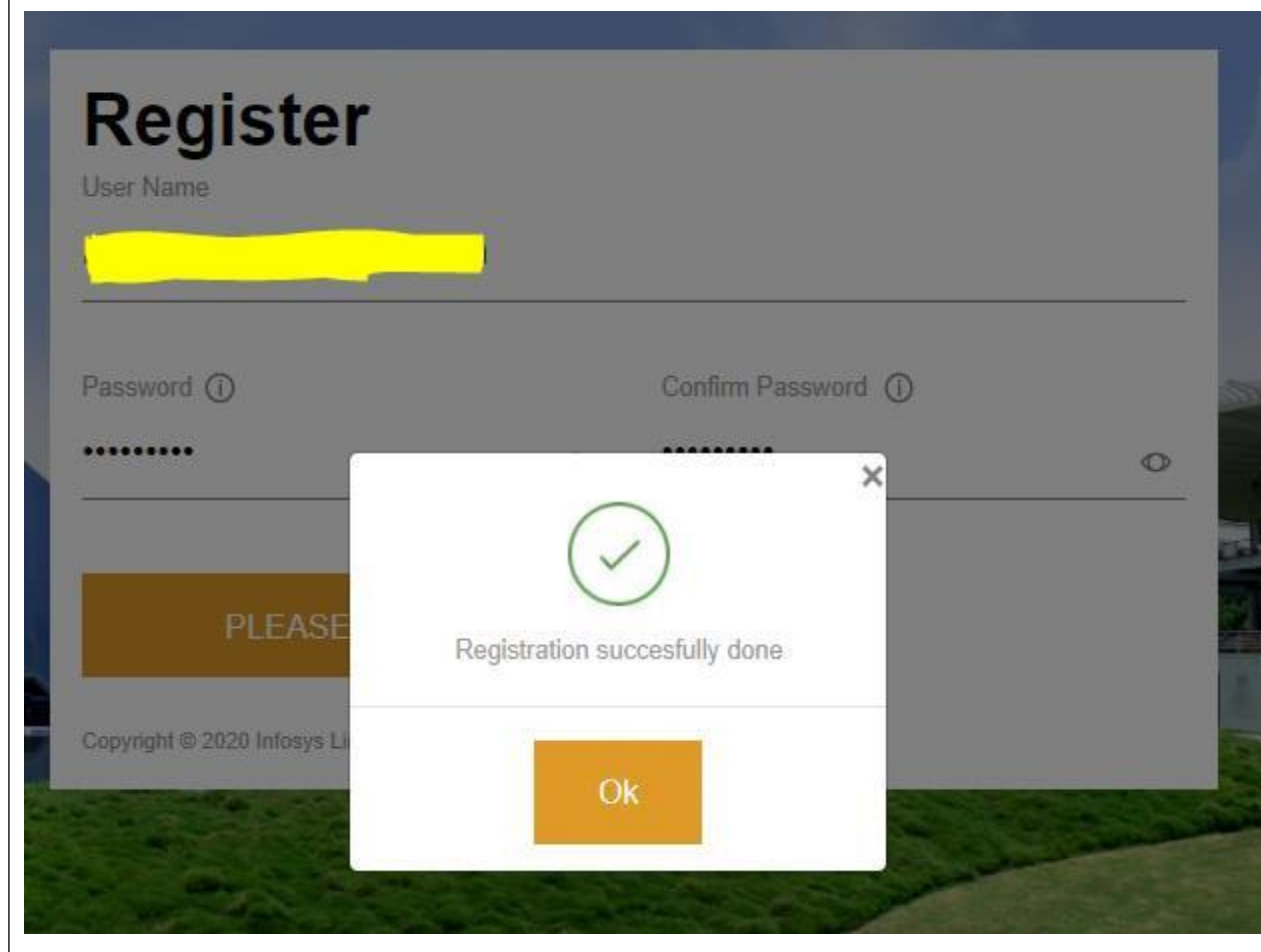
Note – a) User Name should be e-mail id which will be used for login subsequently.

b) Kindly note character for creating a valid password. Password should be of minimum 8 characters in length and should have at least one uppercase, one lower case, one numeric & one special character.



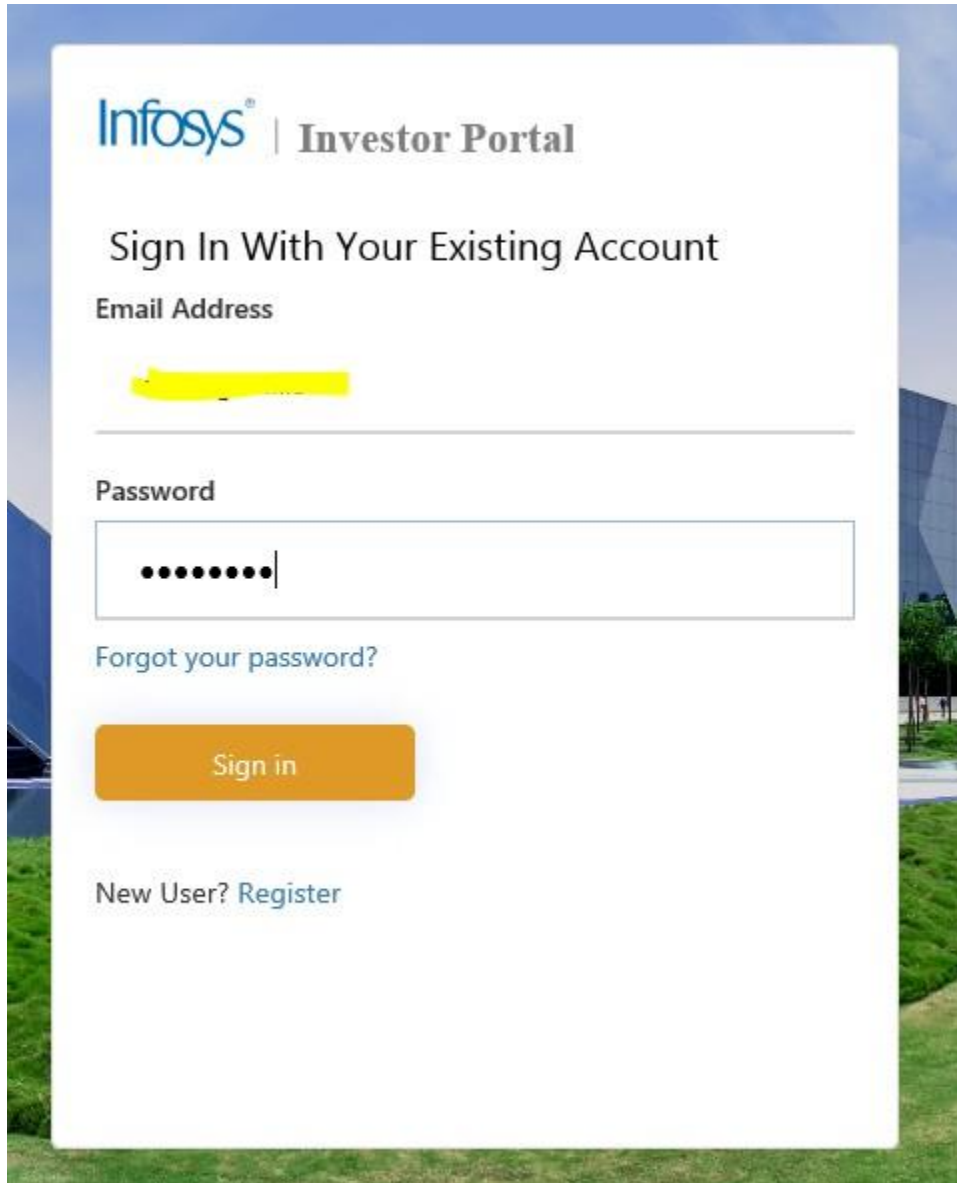
Once the email id & password is provided, shareholder should click on “REGISTER” – see above image.

After clicking Register, a message will pop-up “Registration successfully done” - see below image. It shows that shareholder is registered onto the portal for uploading various documents/declarations/other compliances.



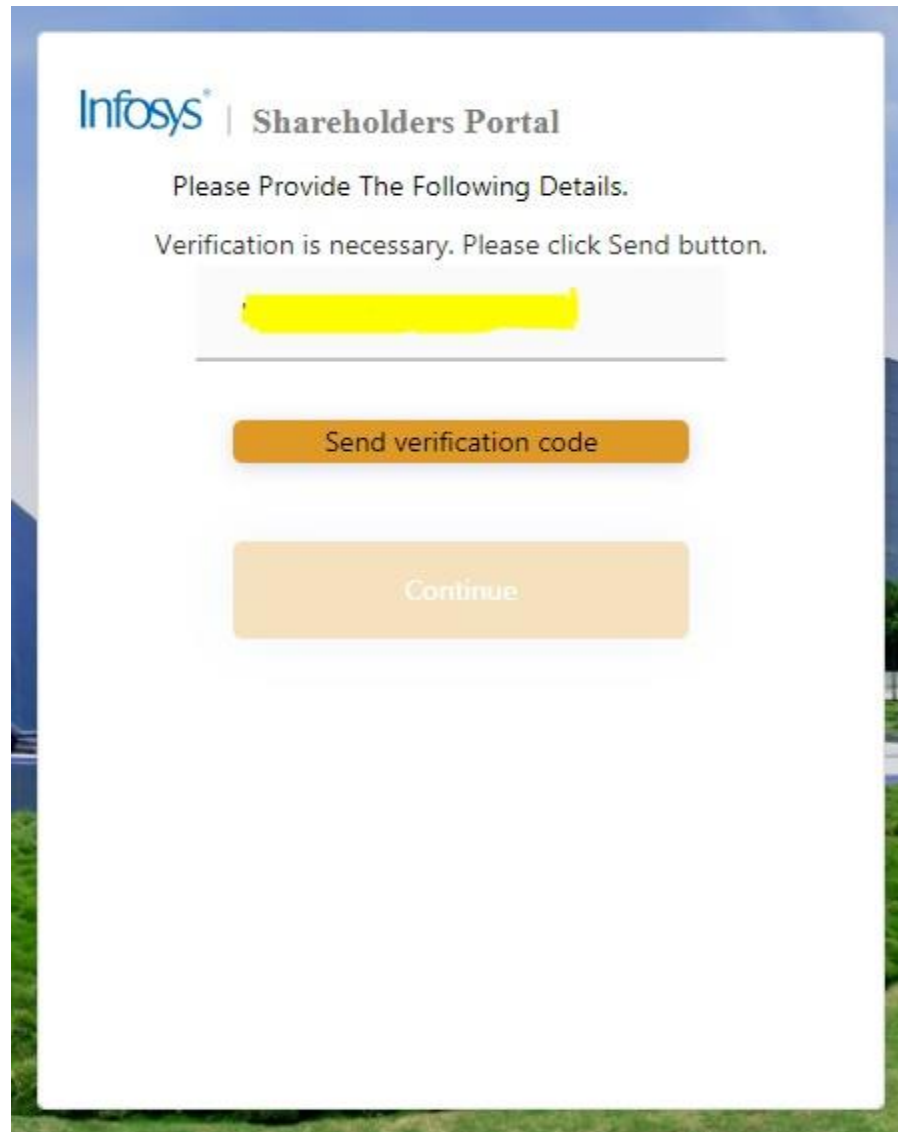
## 5. How to login into the Portal?

**Answer:** Once registration is complete, shareholder can visit the “**Shareholder portal**” link (Refer above point -3) and then can login (**Sign in**) onto the portal using the same email id & password which is used as above for registration. Below is the image showing the same:-



The image shows a screenshot of the Infosys Investor Portal login page. The page has a white background with a blue header area. At the top left, the Infosys logo is displayed in blue, followed by the text "Investor Portal" in a dark grey font. Below the header, the main heading "Sign In With Your Existing Account" is centered in a large, dark grey font. Underneath this heading, there are two input fields. The first is labeled "Email Address" and contains a yellowed-out email address. The second is labeled "Password" and contains a series of black dots representing a masked password. Below the password field, there is a link that says "Forgot your password?". A prominent orange button with the text "Sign in" is positioned below the password field. At the bottom of the form, there is a link that says "New User? Register". The background of the page is a blurred image of a modern building and greenery.

After clicking onto "Sign in ", shareholder will be directed to a new window of verification page. Shareholder should check email id shown on the verification page and click on "send verification code" (See below image).



Once this is done, verification code (**OTP**) will be sent to the email id which is used for registration



Infosys® | Shareholders Portal

Please Provide The Following Details.

Verification code has been sent to your inbox. Please copy it to the input box below.

[Redacted]

Verification code

Verify code

Send new code

Continue

Shareholder should check the email id for verification code (OTP) and enter that verification code (OTP) in the box (see below image). After entering the verification code (OTP), click on **“verify code”**

Infosys® | Shareholders Portal

Please Provide The Following Details.

Verification code has been sent to your inbox. Please copy it to the input box below.

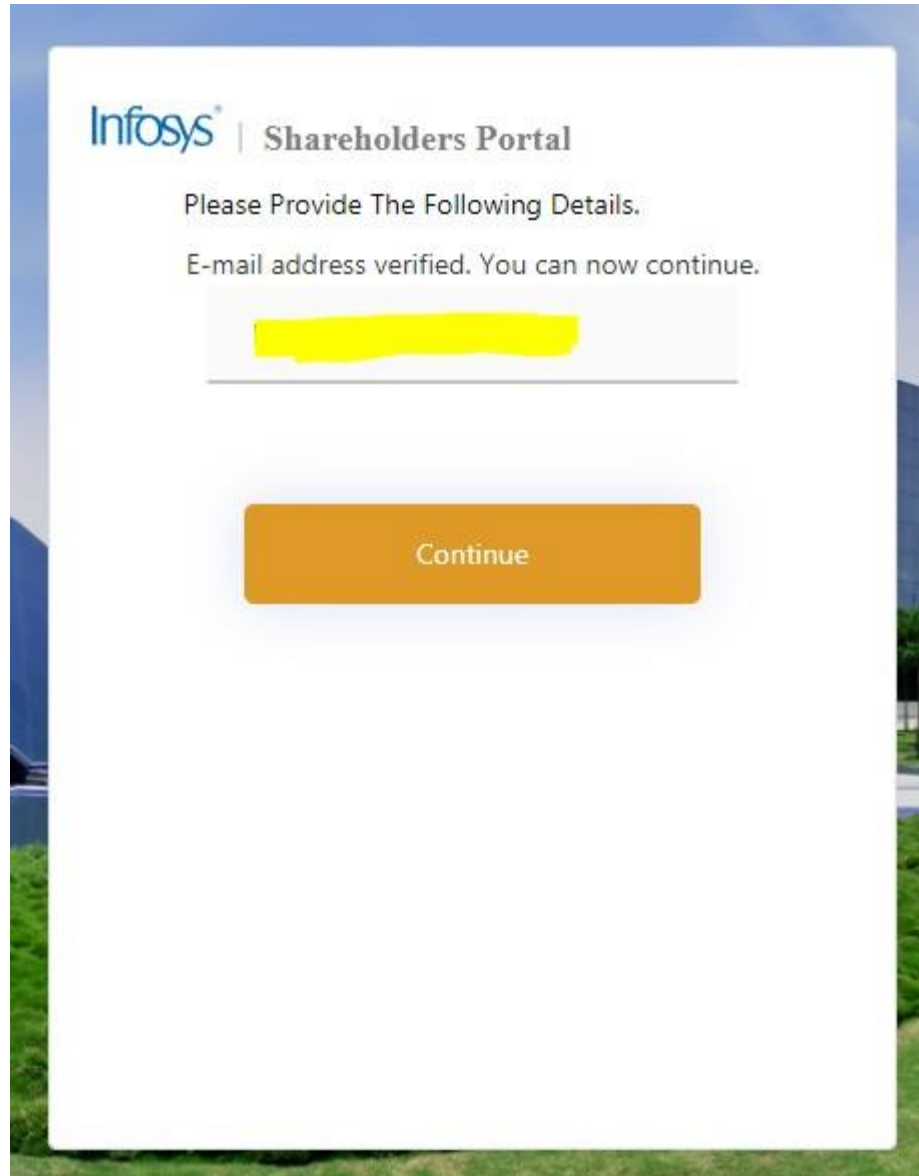
[Redacted]

Verify code

Send new code

Continue

Once the, email id is verified through verification code (OTP), shareholder will be directed to a new window which says email id verified and Shareholder will be asked to continue. Please click on **“Continue”**



After clicking onto "Continue " as shown above, shareholder has to read **Privacy & Data Protection guidelines.**

After accepting the Privacy & Data Protection Policy, a new window will appear showing profile details and relevant sections as applicable to such shareholder.

## 6. Profile Section

**Answer:** Shareholder should check their information as appearing in the profile section.

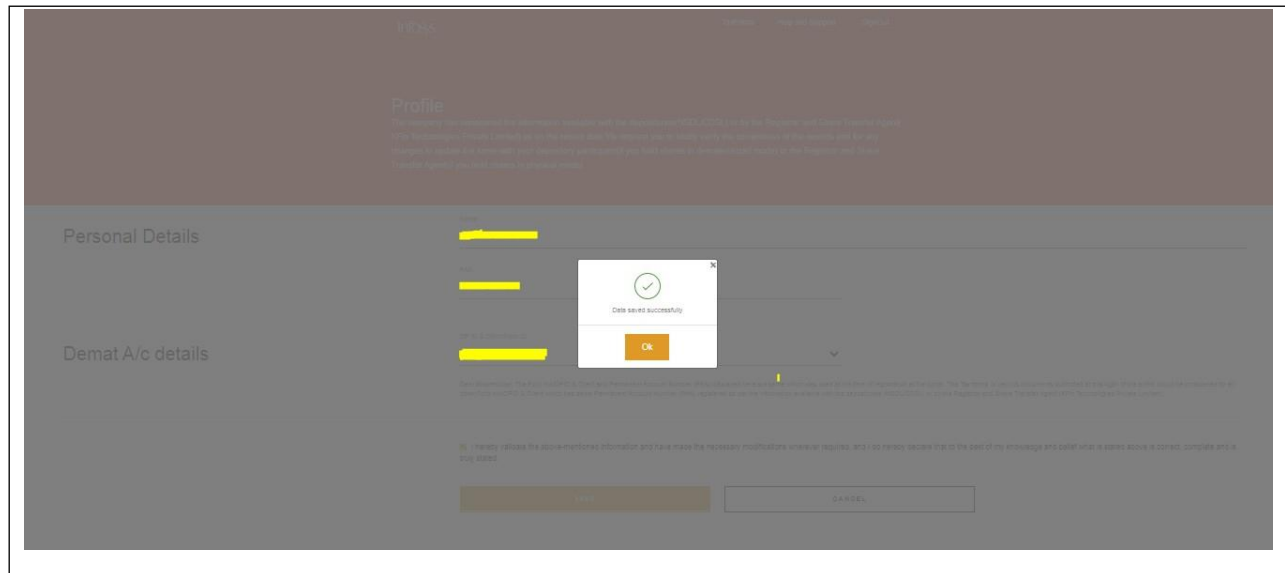
Kindly Note that the company has considered the information available with the depositories (NSDL/CDSL) or by the Registrar and Share Transfer Agent ( KFin Technologies Private Limited) as on the record date. We request you to kindly verify the correctness of the records and for any changes, to update the same with your depository participant (if you hold shares in dematerialized mode) or the Registrar and Share Transfer Agent (if you hold shares in physical mode).

Profile information can be verified by checking the box at the bottom of profile page and clicking on **“save”** button. See below image for reference –

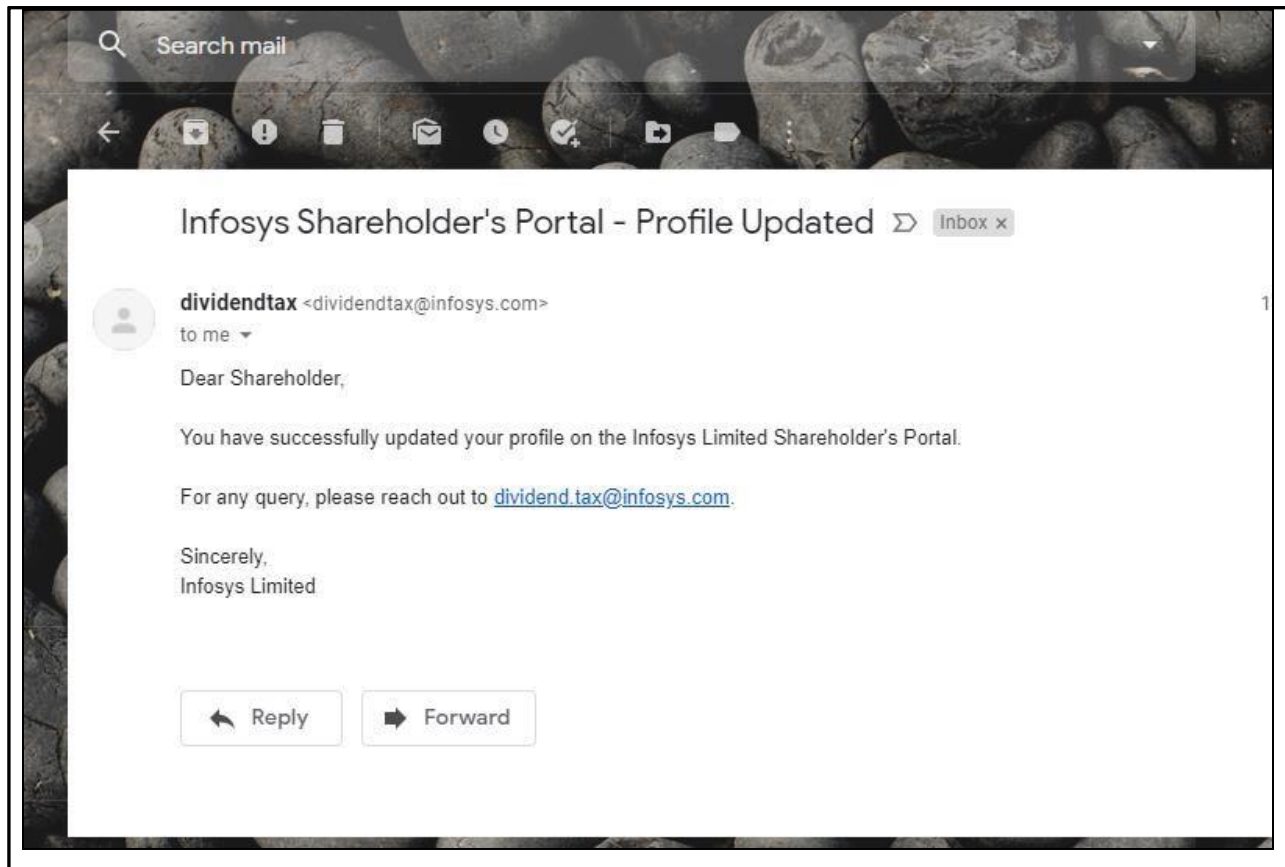
The screenshot shows the Infosys Profile page. At the top, there is a navigation bar with 'TaxForms', 'Help and Support', and 'SignOut'. The main heading is 'Profile', followed by a disclaimer: 'The company has considered the information available with the depositories(NSDL/CDSL) or by the Registrar and Share Transfer Agent( KFin Technologies Private Limited) as on the record date. We request you to kindly verify the correctness of the records and for any changes to update the same with your depository participant(if you hold shares in dematerialized mode) or the Registrar and Share Transfer Agent(if you hold shares in physical mode).' Below this, there are two sections: 'Personal Details' and 'Demat A/c details'. The 'Personal Details' section has fields for 'Name' and 'PAN', both of which are redacted with yellow bars. The 'Demat A/c details' section has a dropdown menu for 'DP ID & Client/Folio ID', also redacted with a yellow bar. Below the dropdown, there is a disclaimer: 'Dear Shareholder, The Folio No/DPID & Client and Permanent Account Number (PAN) displayed here are same which was used at the time of registration at the portal. The Tax forms or various documents submitted at this login of the portal would be considered for all other Folio No/DPID & Client which has same Permanent Account Number (PAN) registered as per the information available with the depositories (NSDL/CDSL) or by the Registrar and Share Transfer Agent (KFin Technologies Private Limited).' At the bottom, there is a checkbox with the text: 'I hereby validate the above-mentioned information and have made the necessary modifications wherever required, and I do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated.' Below the checkbox are two buttons: 'SAVE' and 'CANCEL'. There are also two eye icons for toggling visibility.

Kindly note that the Folio No/DPID & Client and Permanent Account Number (PAN) displayed in profile are same which was used at the time of registration at the portal. The Tax forms or various documents submitted at this login of the portal would be considered for all other Folio No/DPID & Client which has same Permanent Account Number (PAN) registered as per the information available with the depositories (NSDL/CDSL) or by the Registrar and Share Transfer Agent (KFin Technologies Private Limited).

After verification and validation of information in the profile page and on clicking the save button, a message will appear that data saved successfully. See below image -



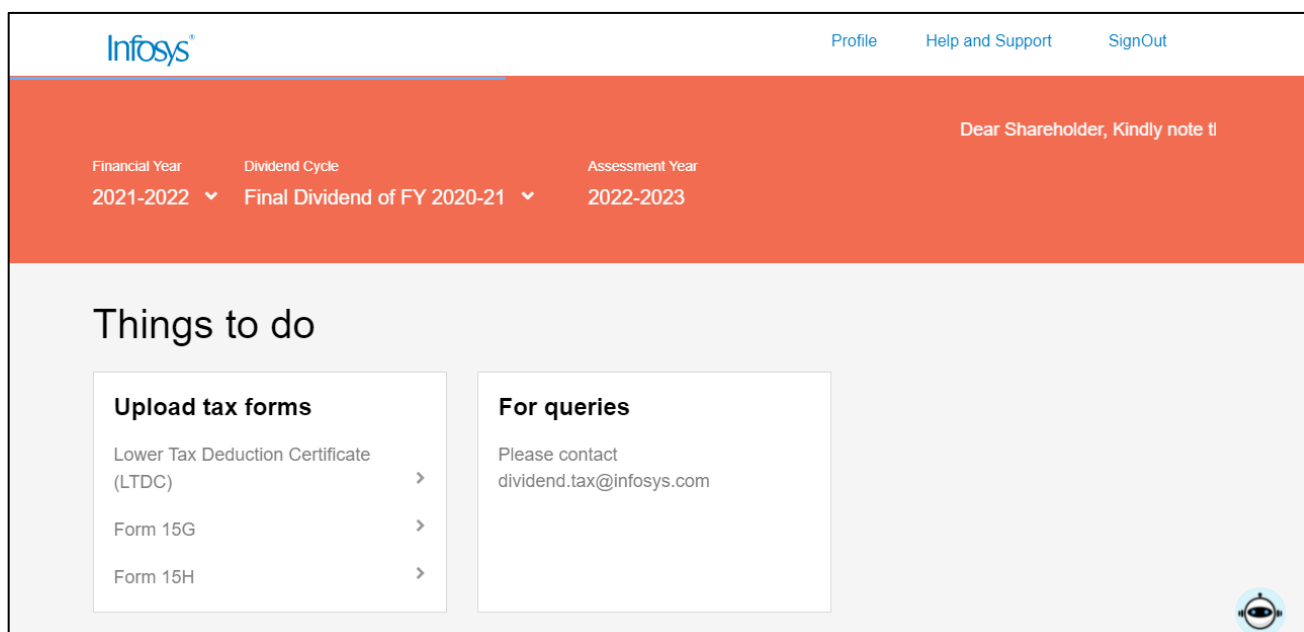
Parallel, a confirmation email will also be sent on the registered email id on successful updation of profile. See below image-



## 7. Submission & upload of documents?

**Answer:** After validation of profile information, shareholder will be directed to new page where they can submit eligible documents/declarations/forms as per their legal tax status. Kindly note that the portal shall be available for the shareholder to submit the tax forms or various tax documents up to June 7, 2021. No tax forms or tax documents will be considered after June 7, 2021.

Documents/declarations/Forms can be uploaded/submitted in the below section –



The screenshot displays the Infosys shareholder portal. At the top left is the Infosys logo. On the top right are links for 'Profile', 'Help and Support', and 'SignOut'. Below the navigation bar is a red header area with the text 'Dear Shareholder, Kindly note th'. Underneath the header, there are three dropdown menus: 'Financial Year' (2021-2022), 'Dividend Cycle' (Final Dividend of FY 2020-21), and 'Assessment Year' (2022-2023). The main content area is titled 'Things to do' and contains two columns. The left column, 'Upload tax forms', lists 'Lower Tax Deduction Certificate (LTDC)', 'Form 15G', and 'Form 15H', each with a right-pointing arrow. The right column, 'For queries', contains the text 'Please contact dividend.tax@infosys.com'. A small robot icon is visible in the bottom right corner of the screenshot.

**A. Tax Documents for Resident Individual Shareholder** – A resident individual can submit below forms (depending on the eligibility) as appearing on the upload tax forms tab.

**A.1. Form 15G – Applicable for a Resident Individual shareholder. Below fields need to filled in**

Form 15G [Any other declaration](#)

You have successfully submitted the document. If the document is found in accordance with the provisions of the Income Tax Act, 1961, the same shall be considered while deducting the taxes

Assessment status as per  
income tax act 1961

I am assessed to tax under the Income-tax Act, 1961

Latest assessment year for which assessed

[Redacted] ▼

Estimated Income For  
Declaration

Estimated Dividend Income For This Declaration [Redacted]	Estimated Total Income Of Shareholder For Financial Year 2021-22 [Redacted]
Nature Of Income Dividend	Section For Tax Deduction 194

Details of other Form 15G  
filed with other entities  
during the year 2021-22

Total Number Of Other Form 15G Filed With Other Entities [Redacted]	Aggregate Income Of Other Form 15G For Other Entities For The Financial Year 2021-22 [Redacted]
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I, [Redacted] do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated. I declare that the incomes referred to in this form are not includible in the total income of any other person under sections 60 to 64 of the Income-tax Act, 1961. I further declare that the tax on my estimated total income including income/ incomes referred to in this form and aggregate amount of income/incomes referred to in this form is computed in accordance with the provisions of the Income-tax Act, 1961, for the previous year ending on 31st March, 2022 relevant to the assessment year 2022-2023 will be nil. I also declare that my income/incomes referred to in this form and the aggregate amount of income/ incomes referred to in this form for the previous year ending on 31st March, 2022 relevant to the assessment year 2022-2023 will not exceed the maximum amount which is not chargeable to income-tax.

Once the above fields are filled, shareholder can verify/accept the form and submit by clicking on “**submit**”

Kindly note, an **individual shareholder**, who is a **resident** of India can submit Form 15G if:

- a. The person has a valid PAN
- b. Tax on estimated total income shall be **Nil** (including income for which declaration is being made and incomes for which declarations has been provided earlier to anyone for current financial year).
- c. Income for which declaration is being given and aggregate amount of incomes for which all declarations given earlier to Infosys or anyone for current financial year under form 15G shall not exceed the **maximum amount not chargeable to tax** (i.e. Rs. 2,50,000).

**A.2. Form 15H – Applicable for a Resident Individual shareholder who is of age sixty years or more at any time during FY 2021-22. Below fields need to filled in**

Form 15H    Any other declaration

You have successfully submitted the document. If the document is found in accordance with the provisions of the Income Tax Act, 1961, the same shall be considered while deducting the taxes

Assessment status as per  
income tax act 1961

I am assessed to tax under the Income-tax Act, 1961

Latest assessment year for which assessed

[Redacted] ▼

Estimated Income For  
Declaration

Estimated Dividend Income For This Declaration	Estimated Total Income Of Shareholder For Financial Year 2021-22
[Redacted]	[Redacted]
Nature Of Income	Section For Tax Deduction
Dividend	194



Details of other Form 15H  
filed with other entities  
during the year 2021-22

Total Number Of Other Form 15H Filed With Other Entities	Aggregate Income Of Other Form 15H For Other Entities For The Financial Year 2021-22
<input type="text"/>	<input type="text"/>
Date Of Birth	
<input type="text"/>	<input type="text"/>

I,  do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated. I declare that the incomes referred to in this form are not includible in the total income of any other person under sections 60 to 64 of the Income-tax Act, 1961. I further declare that the tax on my estimated total income including income/ incomes referred to in this form and aggregate amount of income/incomes referred to in this form is computed in accordance with the provisions of the Income-tax Act, 1961, for the previous year ending on 31st March, 2022 relevant to the assessment year 2022-2023 will be nil. I also declare that my income/incomes referred to in this form and the aggregate amount of income/ incomes referred to in this form for the previous year ending on 31st March, 2022 relevant to the assessment year 2022-2023 will not exceed the maximum amount which is not chargeable to income-tax.

<input type="button" value="SUBMIT"/>	<input type="button" value="CANCEL"/>
---------------------------------------	---------------------------------------

Kindly Note, an **individual shareholder**, who is a **resident** of India aged **60 years or more**, can submit Form 15H if:

- The person has a valid PAN
- Tax on estimated total income shall be **Nil** (including income for which declaration is made and incomes for which declarations was provided earlier to Infosys or anyone for current financial year).
- The total income is after allowing deduction under Chapter VIA and / or after set off of losses under the head "House Property".

**A.4. Lower Tax Deduction Certificate (LTDC)** – Shareholder can also submit LTDC if any obtained from Tax authority under the tab “(LTDC)”. LTDC document have to be attached under the tab “choosefile”. After attaching a valid LTDC, shareholder can validate the information by checking on box and submit the same by clicking on Submit.

Lower Tax Deduction Certificate (LTDC)    Any other declaration

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Document Type  
Lower Tax Deduction Certificate (LTDC)

Attach Document \*  
 No file chosen

Please Note: File size allowed is 5MB and allowed file types are .png, .jpeg, .jpg, .pdf, .tiff

I hereby validate the above-mentioned information and have made the necessary modifications wherever required, and I do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated.

**A.3. Other document** – Shareholders can also submit any other documents (if eligible) under the tab “**Any Other declaration**” as shown below. For this, shareholder have to attach the relevant document under the tab “choose file”. After attaching a valid document, shareholder can validate the information by checking on box and submit the same by clicking on Submit button. See below image –

Lower Tax Deduction Certificate (LTDC)    Any other declaration

---

Document Type  
others

Attach Document \*  
 No file chosen

Please Note: File size allowed is 5MB and allowed file types are .png, .jpeg, .jpg, .pdf, .tiff

I hereby validate the above-mentioned information and have made the necessary modifications wherever required, and I do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated.

**B. Tax Documents for non- resident Shareholder** – A non-resident individual can submit below forms/documents (depending on the eligibility) as appearing into the upload tax forms

The screenshot shows the Infosys portal dashboard. At the top, there is a navigation bar with the Infosys logo on the left and links for Profile, Help and Support, and SignOut on the right. Below the navigation bar, a message states: "holder, Kindly note that the portal shall be available for the shareholder to submit the tax forms or various tax documents between Mar 7, 202". Below this message, there are three dropdown menus for selection: Financial Year (2021-2022), Dividend Cycle (Final Dividend of FY 2020-21), and Assessment Year (2022-2023). A tooltip for the Dividend Cycle dropdown shows "Final Dividend of FY 2020-21". The main content area is titled "Things to do" and contains two columns. The left column, "Upload tax forms", lists: No P.E declaration, Tax Residence Certificate (TRC), Beneficial Ownership, Form 10F, Rule 37BC, and Lower Tax Deduction Certificate (LTDC). The right column, "For queries", contains the text: "Please contact dividend.tax@infosys.com". A small circular icon is visible in the bottom right corner of the dashboard area.

The above tax forms, tax documents, tax declarations can be submitted by upload functionality wherein a non- resident shareholder can browse and attach the documents against the relevant tab. For e.g. to submit Tax Residency Certificate (TRC), below upload functionality can be used-

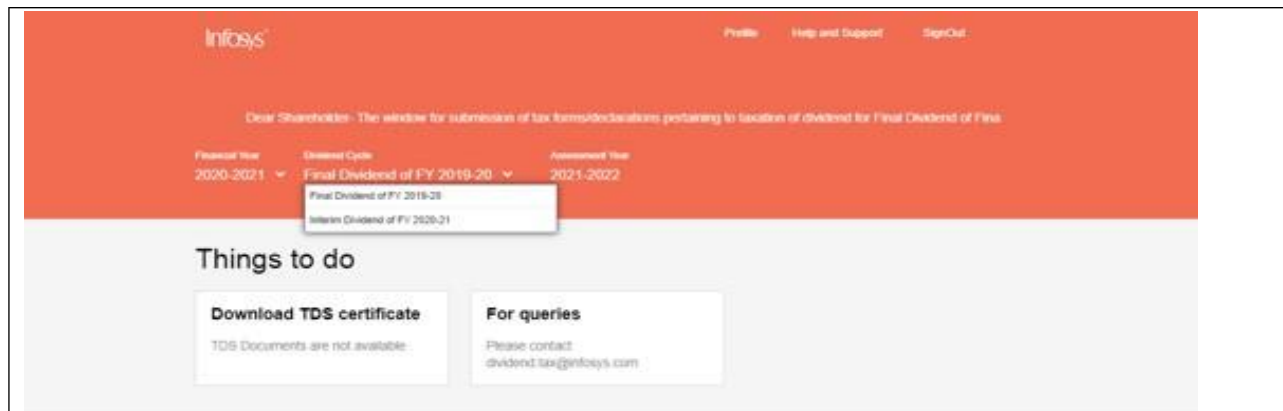
The screenshot shows the upload functionality for a Tax Residence Certificate (TRC) on the Infosys portal. At the top, there is a navigation bar with the Infosys logo on the left and links for Profile, Help and Support, and SignOut on the right. Below the navigation bar, there is a dropdown menu for "LTDC" with a right arrow. The main content area has two tabs: "Tax Residence Certificate (TRC)" and "Any other declaration". The "Tax Residence Certificate (TRC)" tab is active. Below the tabs, there is a "Document Type" field with "Tax Residence Certificate (TRC)" selected. To the right, there is an "Attach Document" section with a "Choose File" button and the text "No file chosen". Below this, there is a "Please Note" section with the text: "File size allowed is 5MB and allowed file types are .png, .jpeg, .jpg, .pdf, .gif". At the bottom, there is a checkbox with the text: "I hereby validate the above-mentioned information and have made the necessary modifications wherever required, and I do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated." Below the checkbox, there are two buttons: "SUBMIT" and "CANCEL".

After the applicable tax forms/tax declarations are uploaded, shareholder can submit by clicking on “SUBMIT” button as shown in above image.

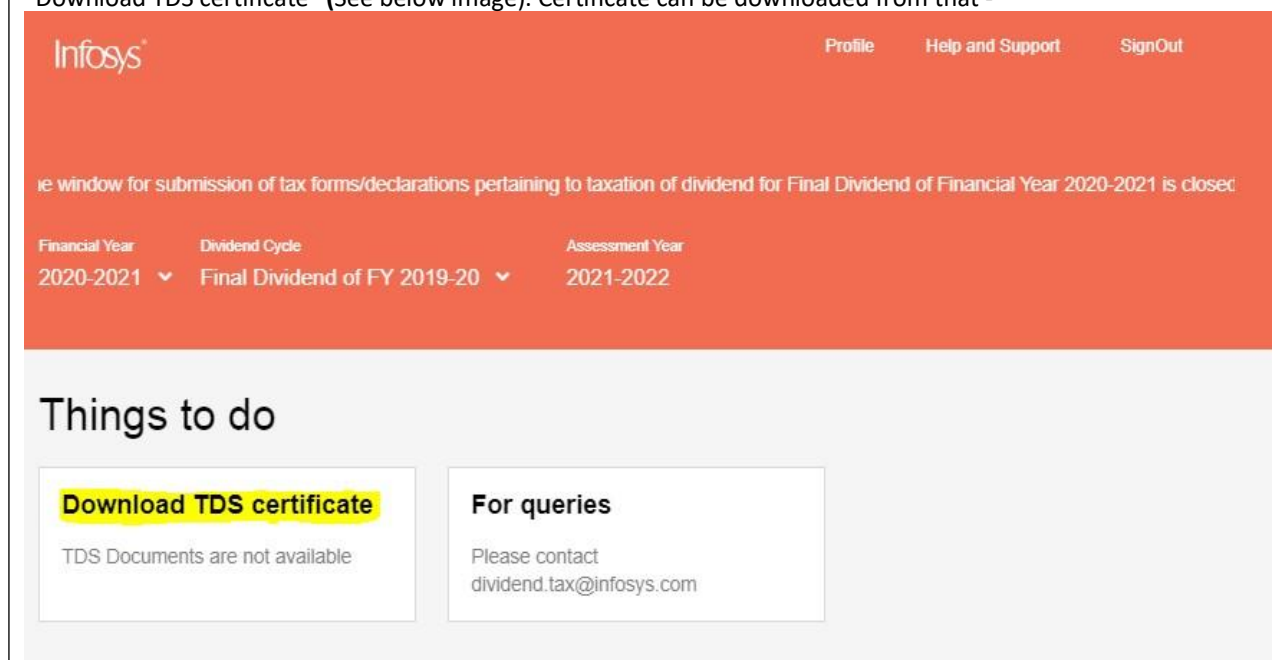
**8. From where TDS certificate can be download or Tax credit can be viewed?**

**Answer:** Shareholder for whom tax was deducted (i.e. TDS done) on payment of Final Dividend of FY 2019-20/ Interim Dividend of FY 2020-21, TDS certificate can be downloaded by following below steps –

- a) Login into the Shareholder’s Portal.
- b) From dropdown option in Dividend Cycle tab select “**Final Dividend of FY 2019-20**”. See below image –



c) after selecting “Final Dividend of FY 2019-20” from drop down, shareholder will get new box below showing “Download TDS certificate” (See below image). Certificate can be downloaded from that -



d) Tax credit against the TDS deducted for a shareholder can also be seen in Form 26AS through TRACES or e-filing website of income tax department. A guide (**TDS Credit**) on steps to be followed to view Tax Credit can be accessed at “**Help and Support**” tab on the top of login portal of shareholders. See below image –

The window for submission of tax forms/declarations pertaining to taxation of dividend for Final Dividend of Financial Year 2020-2021 is closed

Financial Year: 2020-2021 ▼ Dividend Cycle: Final Dividend of FY 2019-20 Assessment Year: 2021-2022

## Things to do

### Download TDS certificate

TDS Documents are not available

### For queries

Please contact  
dividend.tax@infosys.com

## 9. Support on WhatsApp

**Answer:** Shareholder can also use the WhatsApp for queries on tax on dividend. Below are the different methods to access the same-

Mobile Number	+916366953150	Add mobile number in contact list and send 'Hi' to initiate Chat.
Scan QR Code		A user must scan this QR code to initiate WhatsApp chat. It enables them to become opted-in as well as active user.
Click URL	<a href="https://signupforservices.com/whatsapp/optin/?bld=d364765a-7e6d-47d8-b002-955a7e2f1557&amp;bName=InfosysDividendTaxAssist&amp;s=URL&amp;lang=en_US">https://signupforservices.com/whatsapp/optin/?bld=d364765a-7e6d-47d8-b002-955a7e2f1557&amp;bName=InfosysDividendTaxAssist&amp;s=URL&amp;lang=en_US</a>	A user must click on this URL to initiate WhatsApp chat. It enables them to become opted-in as well as active user.